

**Proposed Arizona Best Practice for  
Bundled Customer (meter exchange required) to Direct Access**

This document identifies the process description and proposed best practice of when a customer switches from UDC Standard Offer Service to Direct Access Service. The information contained in the document is based current and proposed business practices identified by APS, SRP, and Tucson Electric Power Company. Many of the practices are pending resolution by way of Provider proposals yet to be addressed. This document is a working DRAFT and only represents the positions of the aforementioned Utilities.

Legend:

<b>RC</b> = ACC Competition Rule Change Required	<b>UPP</b> = UDC and Provider Process, NO ACC action needed
<b>CSI</b> = Clarification of Staff's Interpretation	<b>N/A</b> = No Action Needed
<b>UTC</b> = Utility Tariff/Article/Protocol Change Required	<b>NC</b> = No Consensus

UDC Process Description	Proposed Arizona Best Practice	RC	CSI	UTC	UPP	N/A	NC
<b>Assumptions:</b>							
<b>Step 1</b> – ESP Sends Enrollment DADR (#1 in Meter Data Element Comparison Document)	The DADR Group will handle any standardization needed. This however, is the first high level step in the entire process					<b>X</b>	
<b>Step 2</b> – UDC sends existing meter attributes etc. to MSP/ESP (#2 in Meter Data Element Comparison Document)	<b>Form Name:</b> The form that the UDCs will use to communicate existing meter attributes to MSP/ESP will be called the <b>EMI</b> (Existing Meter Information) Form.			<b>X</b>	<b>X</b>		

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	<b>Timing Requirements:</b> The EMI and the Equipment Purchase Authorization (EPA) will be sent within 5 workdays of receiving DASR information						
<b>Step 2.1</b> – What is the period of time that an MSP can not exchange the meter? ( <b>Blackout Window</b> )	Pending ESP Proposal						
<b>Step 2.2</b> – What is the process for handling the purchase of CT and PT (VT) and associated equipment.							
	<b>Voltage level for ownership:</b> <ul style="list-style-type: none"> <li>• Zero up to and including 600 volts</li> <li>• Greater than 600 volts up to and including 25 kV</li> <li>• Greater than 25 kV</li> </ul>					<b>X</b>	
	<b>Who may own Instrument Transformers at each voltage level:</b> <ul style="list-style-type: none"> <li>• UDC</li> <li>• ESP</li> <li>• MSP</li> <li>• Customer</li> </ul> <p>See UDC Business Rule Comparison document for each UDC's rules (Appendix M-<u>  </u>).</p>						<b>X</b> The only difference is that SRP may own at all voltage levels and TEP & APS will only own greater than 25 kV

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	<b>Buying Equipment:</b> <ul style="list-style-type: none"> <li>• <b>Meters:</b> See UDC Business Rule Comparison document for each UDC's rules (Appendix M-<u>  </u>).</li> </ul>						<b>X</b> UDC processes are the same with the exception that SRP will sell the existing meter in the field and TEP and APS will not.
	<ul style="list-style-type: none"> <li>• <b>CT/PT (VT):</b> UDC's will sell new (from stock) and existing CT/PT (VT)</li> </ul>				<b>X</b>		
	<ul style="list-style-type: none"> <li>• <b>Associated Equipment:</b> UDCs will sell new (from stock) and existing Associated Equipment</li> </ul>				<b>X</b>		
	<b>Equipment Costs:</b> See UDC Business Rule Comparison document for each UDC's rules (Appendix M- <u>  </u> ).					<b>X</b>	

	<p><b>Process for handling damaged/altered equipment discovered by the MSP before exchange is done</b></p> <p>Call the UDCs Metering Point of Contact for coordination of work and the UDC will generate a field order. The UDC will contact MSP when the work is complete.</p>			X	X		
	<p><b>Responsibility for maintenance of CT/PT (VT):</b></p> <p>Maintenance and servicing of metering equipment will be limited to the UDC, the ESP, or the MSP.</p>			X		X	
<p><b>Step 3</b> – MSP/ESP sends scheduling information to UDC (#3 in Meter Data Element Comparison Document)</p>	<p><b>Form Name:</b> The name of the form that the MSPs will use to communicate scheduling information to the UDCs will be called the <b>MDCR</b> (Meter Data Communication Request) Form.</p> <p><b>Timing Requirements:</b></p> <p><b>Return of MDCR Form:</b> The MDCR Form and the EPA (if applicable) must be returned at least 5 working days prior to the exchange.</p>			X	X		

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<b>Step 3.1</b> – MSP exchanges meter – When does ESP take responsibility for meter/customer?	Pending Provider Proposal						
<b>Step 3.2</b> –Who is responsible for the usage while the meter is out of the socket during the exchange?	Pending Provider Proposal						
<b>Step 4</b> – MSP/ESP sends information about newly installed meter and required UDC meter information to the UDC. <i>(#4 in Meter Data Element Comparison Document)</i>	<b>Form Name:</b> The name of the form that the MSPs will use to communicate information about newly installed meters and UDC meter information to the UDCs will be called the <b>MIRN</b> (Meter Installation/Removal Notification) Form.			<b>X</b>	<b>X</b>		
	<b>Timing Requirements:</b>  <b>Return of Form:</b> MSP must return MIRN form no later than 3 working days from the day of the exchange.			<b>X</b>	<b>X</b>		
	<b>Return of Meter:</b> The meter must be returned to the UDC within 15 working days of the removal.			<b>X</b>	<b>X</b>		

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	<b>Note:</b> Drop off sites/shipping options will vary between UDCs.						
	<b><u>Charge for damaged UDC equipment or equipment not returned:</u></b> See UDC Business Rule Comparison document for each UDCs rules (Appendix M-_)					<b>X</b>	
<b>Step 5 – Billing ESP, MSP, customer for equipment, work performed, non-returned meters, site meet charges, etc.</b>	UDCs will bill ESP, MSP or customer at least monthly for equipment, work performed, non-returned meters, site meet charges, etc from the previous month.				<b>X</b>		
<b>MISC BUSINESS PROCESSES:</b>							
<b>Handling of Load Research for customers going DA</b>	If a current load research account switches to DA, TEP, SRP & APS will select another sample. The handling of the existing phone lines may vary. See UDC Business Rule Comparison document for each UDC's rules (Appendix M-_)				<b>X</b>		

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<b>Site Meet &amp; Scheduling Policy</b>	<b><u>When is site meet required?:</u></b> Site meets are required for all UDC owned dedicated substations and may be required for customer loads 1 mW or great or when other special metering equipment is in place, at the discretion of the UDC.				<b>X</b>		
	<b><u>Scheduling:</u></b> MSP returns the MDCR and EPA form with estimated scheduling information and pending ownership information. Additional phone coordination is required for site meets. Timing Requirements: Form must be returned at least 5 working days prior to the exchange.				<b>X</b>		
	<b><u>Site Meet Charges:</u></b> See UDC Business Rule Comparison document for each UDC's rules (Appendix M-_)					<b>X</b>	
	<b><u>Changes to site meet Schedule:</u></b> If there are changes to the anticipated meter exchange time/date – the MSP must notify the UDC of changes to their schedule by 2 p.m. (Arizona Time), 1 workday prior to the exchange date.				<b>X</b>		

<p><b>Access Issues</b></p> <p>Key Process</p> <p>Issues:</p> <p>Keys cannot be copied</p> <p>Liability – customer auth.</p> <p>Locking types: double hasp</p> <p>Lock boxes, utility locks, etc.</p>	<p><b>Customer Access Issues:</b></p> <p><b>Customer Lock:</b></p> <p>MSP will need to make arrangements with the customer to gain access to customers' metering equipment. Utilities will not provide customer keys to MSPs/ESPs.</p> <p>In order to ensure necessary site access in the event of an emergency, the MSP must notify the Utility on the MIRN within 3 working days of any changes in meter access at a customer site.</p>				X		
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**Utility Lock:**

If there is just a Utility lock at the site, the MSP can cut the lock. The MSP must install a square D padlock hasp in order to accommodate the MSP and utility lock. The MSP will also need to install a \_\_\_\_\_ seal with their name or logo on the seal where the utility's lock would normally be installed in order to properly secure the padlock hasp. The MSP must advise the Utility on the MIRN form that the lock was cut. The ESP or MSP may be charged for the lock in accordance to the Utility's applicable service fees.

The ESP and MSP can request a site meet with the UDC to gain access. Site meet charges may apply.